



MARYLAND HERITAGE AREAS AUTHORITY GRANT PROGRAM

CERTIFIED HERITAGE AREA MARKETING GRANT APPLICATION (Fiscal Year 2011)

Information and Procedures



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**MARYLAND HERITAGE AREAS AUTHORITY GRANT PROGRAM
MARKETING GRANT INSTRUCTIONS**

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Each applicant shall comply with all applicable Federal, State, and Local laws and Departmental policies and programs regarding drug, alcohol, and smoke free work places, disabled access and equal opportunity in employment, housing, credit practices and prohibiting discrimination on the basis of race, color, creed, religion, national origin, gender, marital status, familial status, or physical and/or mental disabilities in any aspect of the grant project.

Please be advised that in accordance with provisions of Executive Order 01.01.1983.18, if your application contains any information that may constitute personal information as defined below, you should be aware of the following:

1. Any personal information ("personal information" means any information about a natural person or his/her immediate family which identifies or describes any characteristics including but not limited to education, financial transactions or worth, medical history, criminal or employment record or things done by or to that natural person or his/her immediate family) requested by the Maryland Heritage Areas Authority (MHAA) and supplied by the applicant will be used principally for MHAA's determination of the feasibility of the application;
2. Failure to accurately and adequately supply requested information may seriously jeopardize MHAA approval of the application;
3. MHAA will permit the subjects of any personal information in an application to inspect, amend, and correct such personal information;
4. Any document supplied to or obtained by MHAA may be a public record generally available for public inspection under the Maryland Public Information Act and COMAR 05.01.02; however, under the Maryland Public Information Act trade secrets, information privileged by law, confidential commercial data, and records describing an individual person's finances may not be disclosed; and,

Personal information supplied to MHAA in an application may be shared with other state, local, or federal government agencies involved with the proposed financing or project.

INTRODUCTION

The Maryland Heritage Areas Authority (MHAA) Grant Program is a source of funding designed to assist and encourage the preservation of historical, archeological, natural, and cultural resources, and support economic development through heritage tourism within heritage areas certified by the Maryland Heritage Areas Authority. Heritage area grant awards are made from the MHAA Financing Fund, a non-lapsing, revolving fund into which up to \$3 million is deposited annually. Regulations governing the program are available on the Internet at mhmt.maryland.gov – click on “Heritage Areas.” The following is general information about the Heritage Areas Grant Program and instructions for completing the Certified Heritage Area Marketing Grant application package.

Heritage area marketing activities may be funded by MHAA up to **\$50,000** per grant award, provided that the heritage area management entity has completed a **Marketing Plan** in coordination with its affiliated Destination Marketing Organization(s) (DMO). The required contents of the heritage area marketing plan are outlined in Appendix IV. Upon completion of a marketing plan, Certified Heritage Areas may apply for funding of marketing projects at any time following certification. Certified Heritage Areas may **not** apply for additional marketing grant funds **for a period of 24 months following the award of a marketing grant**, except when the Maryland Heritage Areas Authority determines that an additional grant is required to complete the specific marketing activity funded by the initial grant (i.e. the maximum per-grant award of \$50,000 is not sufficient to complete the funded marketing activity). If it is anticipated that the proposed marketing activity will require more than one grant to complete, **this should be clearly stated in the Project Narrative and on the Application Cover Sheet, under Project Information**. Additional funding beyond the initially approved grant is not guaranteed and is subject to the normal grant application and review process, and the availability of funds.

ELIGIBLE ACTIVITIES

Eligible activities must address or complete a priority activity identified in and consistent with the goals, objectives, strategies, and actions outlined in the approved Certified Heritage Area Management Plan. Content for all activities will only include marketable product within the Certified Heritage Area. The following types of marketing activities are eligible for funding with MHAA Grants:

- Advertising Placement – defined as the actual time, space, and/or other format of media necessary to reach a selected audience. Allowable expenditures are limited to the purchase of print space, television time, radio time, and internet time/space.
- Participation in Consumer and Travel Trade Shows – defined as the selling of heritage area travel product at consumer and travel trade shows in identified target markets, such as the Group Tour market. Both in-state and out-of-state shows are allowed. Allowable expenditures include booth space costs and delegate registration fees. Consideration of Trade/Consumer shows listed in the Maryland Office of Tourism Development (MOTD) Annual Development and Marketing Plan is encouraged (see www.visitmaryland.org/; the most recent plan is available at visitmaryland.org/AboutMDTourism/Pages/TourismNewsAndReports.aspx under “Tourism Reports.”
- Printed Material/Collateral – defined as the preparation of communication documents, i.e. brochures, guides, maps, consumer/travel trade show exhibits, video tapes/films, and other similar forms of messaging. Such material must be for the specific purpose of supporting all other marketing activities by design and content. Allowable expenditures include creative, design, production (including layout, etc.), photography, and printing costs.
- Website Development – defined as the necessary actions/expenses required to establish a heritage area on the World Wide Web. Allowable expenses include web site creation and other expenses related to creating and/or enhancing a web presence for the Certified Heritage Area.

NOTE: Interpretation (defined as: The development and presentation of interpretive exhibits, interpretive signage, materials, or other appropriate products to further the educational and recreational objectives of the CHA) is not considered a marketing activity; therefore, it is not eligible for funding under a marketing grant application. See the MHAA “Project Grant Application” form.

INELIGIBLE ACTIVITIES

The following types of activities are **not eligible** for funding with an MHAA Grant, but **may serve as match for the grant**:

- Advertising design/production
- Travel expenses
- Expenses directly related to the fulfillment of advertising inquiries, such as postage, call center fees, etc.
- Website/database routine maintenance (significant enhancement of a Certified Heritage Area website may be eligible, please contact Richard Hughes at 410-514-7685 - rhughes@mdp.state.md.us; or Jennifer Ruffner at 410-514-7612 – jruffner@mdp.state.md.us).

ELIGIBLE APPLICANTS

Only Certified Heritage Area management entities, or their designated marketing partner, in partnership with DMOs recognized by MOTD, are eligible to apply for marketing grants. **Applications must be submitted jointly**, and both organizations must be in good standing with the State of Maryland Department of Assessments and Taxation, be qualified to do business in Maryland, and have the legal capacity and authority to incur obligations involved under the grant program. Certified Heritage Areas must have completed a **heritage areas marketing plan** in coordination with their affiliated DMOs in order to be eligible to apply for funding of marketing activities. See Appendix IV of this application for more information about the required contents of the marketing plan. Upon completion of a marketing plan, Certified Heritage Areas may apply for funding of marketing activities at any time following certification.

Certified Heritage Areas may not apply for additional marketing grant funds for a period of 24 months following the award of a marketing grant, except when the Maryland Heritage Areas Authority determines that an additional grant is required to complete the specific marketing activities funded by the initial grant (i.e. the maximum per-grant award of \$50,000 is not sufficient to complete the approved marketing activity). If it is anticipated that the proposed marketing project will require more than one grant to complete, this should be clearly stated in the Project Narrative and on the Application Cover Sheet under Project Information. Additional funding beyond the initially approved grant is not guaranteed and is subject to the normal grant application and review process, as well as availability of funds.

SELECTION CRITERIA

MHAA Marketing grant proposals will be reviewed using the criteria outlined below.

I) CONSISTENCY WITH THE HERITAGE AREA MANAGEMENT PLAN

1. Is the marketing project or activity(ies) specifically identified or called for in the Certified Heritage Area Management Plan?
2. If the project is not specifically identified in the Certified Heritage Area Management Plan, is the project consistent with the goals, objectives, strategies, standards, and actions outlined in the Certified Heritage Area management plan?

II) CLARITY

1. Are the project's marketing objectives and the methods to accomplish those objectives clearly stated, and is it clear what the products/results of the marketing project will be?

III) URGENCY

1. Is it critical that the project be accomplished within a limited timeframe or does the project present a time-limited special opportunity? What are the drawbacks of delaying the project, e.g. will delay likely lead to loss of funds, are critical personnel only available within a short timeframe, or is the event tied to an anniversary date?

IV) PROJECT DESIGN

1. Are the costs outlined in the project budget reasonable given the goals of the project, and for the services or products being obtained?
2. Are project personnel (if known) appropriately qualified and experienced to carry out the project?
3. Does the budget provide a detailed breakdown of how grant funds will be expended? For consultant services are products and pay rates/fees clearly specified; for staff time being used as match, is each staff person and their job function listed and the specific number of hours and hourly pay rate for each person provided?

V) LEVERAGE

1. Does the project or its products significantly leverage local government and/or private investment; is significantly more match leveraged than required (required = dollar-for-dollar @ 75% cash, max. 25% in-kind); is a majority of the overmatch cash?

VI) IMPACT

1. Will the project increase the visibility of and visitation to sites within the Certified Heritage Area; does the project target a selected audience that is likely to have an interest in the historical, cultural or natural resources of the heritage area; does the project expand and strengthen tourism marketing alliances with local governments, the private sector and local tourism offices?

VII) READINESS

1. Is the project ready to proceed and can project objectives realistically be accomplished within the proposed timetable?
2. Is the match firm and clearly documented to be available by the project's start date, or is some or all match not in-hand (e.g. does the application qualify some match as dependent on a non-awarded grant, requested donations, or projected future income)?

VIII) DEMONSTRATION VALUE

1. Does the project utilize methods or techniques that are transferable for statewide, regional, or local application?
2. Does the project have potential to be a "model"? Will it produce a product unique for quality and innovation?

IX) ADMINISTRATIVE CAPABILITY OF APPLICANT

1. Has the applicant received previous MHAA grants that have demonstrated good administrative capability, or does the applicant have a proven record of successfully administering grants from other agencies/organizations?

2. Does the applicant have other open MHAA grant(s) from previous fiscal years? How and when will these projects be closed out?

X) CONSERVATION AND PRESERVATION (*If applicable to proposed activities)

1. Do the proposed activities increase the protection and enhancement of sites, structures, districts or landscapes which are deemed to be of historic, archaeological, cultural, natural or architectural significance?
2. Are the proposed activities environmentally sensitive through their design, use of materials, or procurement practices?

GRANT AMOUNTS AND MATCHING REQUIREMENTS

Grants for marketing activities may not exceed **\$50,000** per Certified Heritage Area. All grants must be matched in an amount at least equal to the grant. The match must include a cash match equal to at least 75 percent of the grant amount requested from the MHAA. The balance of project match may consist of in-kind contributions. **State of Maryland funds** may **not** be used as match.

Applicants must submit proof of matching funds. This may consist of a financial statement, commitment letter, or other proof that the applicant has matching funds or in-kind contributions dedicated for the project. This proof of matching funds must be submitted to MHAA staff for review prior to final approval of grant awards by the Authority at its July meeting.

GRANT TERMS AND CONDITIONS

All grantees will be required to enter into a grant agreement with the MHAA, which generally contains the following standard terms and conditions:

- Grant Term - All grant funds generally must be expended within no more than 24 months of the date the grant agreement is signed by all parties, unless the MHAA agrees to a longer term or approves in writing an extension of the grant period. Written progress and final reports must be submitted to MHAA during the grant term, generally at the mid-point and end of the project (grant agreements will specify progress report requirements). The Grantee will be required to submit supporting financial documentation with progress and final reports identifying project costs incurred to date.
- Grant Disbursements - Grant funds shall generally be disbursed in no more than three payments, or as specified in the Grant Agreement. Disbursement requests shall identify all costs incurred to date, and shall include copies of invoices documenting actual expenditures. The Grantee may also be required by the Grantor to submit vendor price quotes, bids, cost estimates, or other supporting financial documentation for anticipated future project costs.
- Nondiscrimination - Each applicant shall comply with all applicable federal, state and local laws and policies and programs regarding drug, alcohol and smoke free work places, disabled access and equal opportunity for employment, housing, credit practices and prohibiting discrimination on the basis of race, color, creed, religion, national origin, gender, marital status, familial status or physical and/or mental disabilities in any aspect of the grant project.
- Project Acknowledgment - Grant recipients are required to provide appropriate acknowledgment of MHAA assistance for marketing activities. The MHAA logo will be required to be included in all ads and in all collateral materials. MHAA will provide electronic copies of the MHAA logo.

In addition, the following terms and conditions apply to individual activities funded with MHAA grants:

Advertising Placement

- Grantee shall include the MHAA logo in all advertising (print, television, radio, and/or internet). MHAA will provide a digital copy of the logo in TIFF, JPEG, and Adobe Photoshop® formats. It is **mandatory** that the logo appears in every advertisement that is funded in whole or in part with grant funds. Advertisements placed in publications sponsored by MOTD or advertisements placed as part of an MOTD cooperative advertisement are exempt from this requirement. Radio advertisements shall include the logo verbally, stating that "This ad was paid for in part by the Maryland Heritage Areas Authority."
- Grantee shall include only marketable product within the geographic bounds of the Certified Heritage Area in any/all advertisements.
- Grantee is encouraged to use the services of the Maryland Call Center, which include answering of toll-free telephone numbers, processing of consumer orders, etc.
- MHAA shall have the right to review and reject any ads deemed by the State to be contrary to its best interests.

Consumer and Travel Trade Shows

- Grantee will provide a brief narrative report outlining the results of exhibiting at consumer and travel trade shows. The report shall include but is not limited to number of collateral materials distributed, number of leads collected, number of attendees, demographics of attendees, etc.

Printed Material/Collateral

- Grantee shall publish collateral material to support sales activities or to fulfill inquiries generated through media advertising, direct mail, or media kits directly related to “Allowable Expenditures” listed on page 2 of these guidelines.
- Content of Printed Material/Collateral shall include only marketable product within the geographic bounds of the Certified Heritage Area.
- Grantee shall provide the resources necessary to receive such inquiries, such as telephones, mail systems, fax systems, e-mail, web site, etc.
- Grantee shall include the MHAA logo in all grant supported printed material/collateral. MHAA will provide a digital copy of the logo in TIFF, JPEG, and Adobe Photoshop® formats. It is **mandatory** that the logo appear in any printed/collateral that is funded wholly or in part through the cooperative grant policy. Publications sponsored by MOTD are exempt from this requirement.
- MHAA shall have the right to review and reject any printed/collateral material deemed by the State to be contrary to its best interests.

Website Development

- The Certified Heritage Area management entity, or their designated marketing partner (the “Grantee”), shall provide website linkages to the Maryland Office of Tourism Development website www.visitmaryland.org and to the MHAA website mht.maryland.gov.
- Grantee shall provide website links to the Maryland County DMO websites in their heritage area.
- Grantee shall provide a scope of work or a needs assessment detailing the functions and expectations of the website.
- Grantee shall include the MHAA logo on their heritage area website and/or any marketing website that is funded wholly or in part through the MHAA Marketing grant.

MARYLAND CULTURAL DATA PROJECT: REQUIREMENT TO COMPLETE CULTURAL DATA PROFILE

***For Marketing grants, only the Certified Heritage Area management entity is required to complete a Maryland Cultural Data Profile. Heritage Area management entities must include pertinent information on activities supported by the Marketing grant in their overall MdCDP Profile (for more information, please contact MHAA staff). DMOs are not required to complete a Cultural Data Profile.**

MHAA is engaging in a collaborative partnership of public and private funders throughout the State of Maryland, the Maryland Cultural Data Project (MdCDP) **For FY 2011, MHAA now requires all grant applicants to complete a Cultural Data Profile through the MdCDP Web site (www.mdcdpdata.org).**

What is MdCDP?

This statewide data collection effort for cultural and arts organizations is designed to provide an easier grant application process through the use of a standardized form for reporting applicant financial and organizational data. Further, applicants applying to more than one of the participating grant-giving programs will only need to complete this form once each year. In addition to creating a streamlined application process, applicants will benefit from this project through an enhanced ability to track their individual data and trends over time and compare how they operate relative to their peers and to the culture and arts sector at large. Uses and potential benefits of the MdCDP project include:

- Information for participating nonprofit organizations for use in benchmarking and capacity-building.
- Information for the cultural sector for the purposes of policy and program development and public relations.
- Information for participating grantmakers for use in their application process.
- Information for elected officials regarding the effectiveness of publicly-funded grant programs

How will my organization’s information be used and accessed?

Each organization will have a login and password. You will only be able to view your own organization’s information. Aggregate data will be available for the purpose of benchmarking, but it will not identify any specific organization’s data. When you submit your information along with an application to one of the participating funders, they will be able to view your information and use it for grantmaking purposes.

How do I complete the MdCDP Profile?

In order to complete the Cultural Data Profile, organizations must first register at the MdCDP Web site (www.mdcdpdata.org) by creating an organizational login ID and password. After registering, you will have access to online training and can get support from the Help Desk during regular business hours. Applicants are asked to provide two years of financial and organizational data the first time they complete the Cultural Data Profile (Going forward, groups will

only need to provide one year of data.). Information for the Cultural Data Profile is organized by fiscal year and data is only entered for completed fiscal years for which an approved financial audit or review exists. Organizations that are not audited or reviewed will enter data based on approved year-end financial statements.

How do I submit my information to MHAA?

Upon completion of the Cultural Data Profile, applicants should go to the “Funder Reports” section of the MdCDP Web site and print the pre-defined report for the Maryland Heritage Areas Authority application. Relevant information from the applicant’s Cultural Data Profile will automatically be imported into the report. The printed report must be included with your application materials.

Applicants should direct questions concerning the Maryland Cultural Data Profile to:

Maryland CDP Help Desk:

Toll Free: 1-866-9-MD-DATA (1-866-963-3282)

Email: help@mdculturaldata.org

The Maryland CDP Help Desk is available Monday – Friday from 9:00am – 5:00pm.

Maryland CDP Web site: <http://www.mdculturaldata.org>

GRANT SCHEDULE

Marketing Grant applications are submitted directly to MHAA. FY11 applications must be submitted to MHAA by no later than close of business on **April 2, 2010**. Once submitted, grant applications are first reviewed by MHAA staff for completeness. Complete applications are then forwarded to the MHAA Technical Advisory Committee (TAC) for review and recommendation. The recommendation of the TAC is then forwarded to the MHAA for review and final action at its July meeting. Meetings of the TAC and the MHAA are scheduled on an as-needed basis, but will be held, on average, not less than quarterly. Contact Richard Hughes at 410-514-7685 or rhughes@MDP.state.md.us, or visit the “Heritage Areas” section of the Maryland Historical Trust Internet web site at mht.maryland.gov to learn about upcoming meeting dates and grant deadlines.

APPLICATION FORMAT

MHAA Marketing Grant applications must consist of the following items which are to be submitted as a single package:

Hardcopy (Paper) Applications

I. All applicants must submit **one (1) paper original with original signatures where required, and eleven (11) paper photocopies** on standard 8 ½" x 11" bond paper. The hardcopy grant application packages must be stapled in the left-hand corner and include the **Marketing Project Application Cover Sheet (Appendix I) as the first pages**, and include the following materials:

1. **Cover Sheet.** The instructions for completing the cover sheet are attached as **Appendix I**. The cover sheet form is part of the separate Grant Application file. This form must be attached to the front of the application package.
2. **Cover Letter from Heritage Area Management Entity and DMO(s).** A letter stating that the application is jointly submitted from the Heritage Area Management Entity and all DMOs affiliated with the heritage area must accompany the application. The letter must be signed jointly by the Heritage Area Management Entity and all the DMOs and must indicate the primary contact responsible for completing the projects outlined in the marketing grant. The primary marketing contact will be the entity with which the MHAA will execute the marketing grant agreement.
3. **Narrative Project Description.** At minimum, the narrative project description must completely and concisely address: objectives of the project as related to the heritage area management plan and heritage area marketing plan, project methodology, project timetable, project personnel, budgetary needs, and sources of matching funds provided. Please refer to the outline shown in **Appendix II**.
4. **Project Budget.** The budget form and instructions for completing it are attached as **Appendix III**.
5. **Heritage Area Marketing Plan.** Attach a copy of the heritage area marketing plan completed in coordination with the heritage area affiliated DMOs, as outlined in **Appendix IV**.

The forms for Items 1, 3 and 4 are part of the separate FY2011 Marketing Grant Application file which is available at mht.maryland.gov under “Forms and Documents.” **Please complete and print out the electronic forms in that file rather than using the sample forms contained in this document.**

II. In addition, all applicants must submit **two paper copies only** of the following supporting documentation (it is **not necessary to submit electronic/digital versions** of the following supporting documentation):

6. **Resumes of key project personnel.** Include only the resumes of those people who will perform key project tasks such as consultants and project monitors.

7. **Proof of matching funds.** This may consist of a financial statement, commitment letter, or other proof that the applicant has matching funds or in-kind contributions dedicated for the project. This proof of matching funds must be submitted to MHAA staff for review prior to final approval of grant awards by the Authority at its July meeting.
8. **Proof of nonprofit status (if applicable) and SDAT Standing.** If the management entity is a non-profit organization, proof of non-profit status must be submitted in the form of a copy of the applicant's Articles of Incorporation, By-laws, and, if applicable, Internal Revenue Service 501 (C)(3) approval letter (**copies do not need to be submitted if the materials were previously submitted and no changes have been made**). In addition, the applicant organization must be in good standing with the State of Maryland Department of Assessments and Taxation (SDAT); MHAA will verify the applicant's current status prior to disbursement of grant funds. Applicants must verify their current standing at the Maryland Department of Assessments and Taxation's website at www.dat.state.md.us [select "Business Data Search," then from the "Businesses" section select "Business Data Search," then from the "Main Menu" box select "Business Entity Information (Charter/Personal Property)" and enter the name of your organization or Department ID, finally select "General Info."] Print out the displayed page and attach it to the completed grant application form.
9. **Letters of support.** At least three letters of support for the application for marketing project funding must be submitted, including at least one letter of support from a State Senator, State Delegate, and local governmental entity from within the Certified Heritage Area. Additional letters of support are welcome and taken into consideration by MHAA.

Electronic/Digital Application Files

Two (2) electronic/digital copies of the **Cover Sheet, Narrative Project Description, and Project Budget (Items 1, 3 and 4 above)** must also be submitted on CD-R (Compact Disc-Recordable) disks. Use Microsoft Word[®] or another program readable by Microsoft Word[®] to produce the electronic version. If preferred, the Project Budget may be submitted as a Microsoft Excel[®] or another program readable by Microsoft Excel[®] file. **DO NOT SUBMIT MATERIALS AS PDF FILES OR IN OTHER FORMATS THAT CANNOT BE EDITED BY MICROSOFT WORD[®].**

APPLICATION ASSISTANCE

An MHAA Marketing Grant Application Sample Cover Sheet (Appendix I), Marketing Sample Project Narrative (Appendix II), Sample Budget (Appendix III), and Heritage Area Marketing Plan Outline (Appendix IV) are attached. For your convenience, this application is also available on the Internet at mht.maryland.gov under "Forms and Documents." For questions regarding the preparation of your application, please contact Richard Hughes at 410-514-7685, rhughes@MDP.state.md.us or Jennifer Ruffner at 410-514-7612, jruffner@mdp.state.md.us.

APPLICATION SUBMITTAL

Applications must include **one (1) paper original and eleven (11) paper photocopies** and **two (2) electronic/digital copies** of the of the items specified in the "**Application Format**" section above. In addition, **TWO (2) paper copies** of Key Personnel resumes, Proof of Matching Funds, Proof of Non-Profit Status (if applicable), and Letters of Support must be submitted. Please mail or deliver MHAA grant application packages to:

**Richard Hughes, Administrator
Maryland Heritage Areas Authority
Maryland Historical Trust
100 Community Place
Crownsville, MD 21032-2023**

APPENDIX I: INSTRUCTIONS FOR CERTIFIED HERITAGE AREA MARKETING GRANT APPLICATION COVER SHEET

I. CERTIFIED HERITAGE AREA INFORMATION

1. Indicate the name of the certified heritage area in which the project will occur.
2. Indicate the full legal name of the certified heritage area (CHA) management entity.
3. Indicate the mailing address of the CHA management entity identified above.
4. Indicate the name and title of the individual who will serve as the CHA management entity contact person for the grant.
The contact person should be someone very familiar with the application who will receive all correspondence.
5. Indicate the phone number(s) of the contact person.
6. Indicate the email address of the contact person.
7. Indicate the fax number of the contact person.
8. Indicate the Counties within the involved Heritage Area.
9. Indicate the state legislative district(s) & sub-district(s) included in the Certified Heritage Area. It is important that correct legislative district information is provided. If you are unsure of the district or districts in the Certified Heritage Area, please contact your local library for this information, or visit the Maryland General Assembly Website at <http://mlis.state.md.us> ;or see <http://mdelect.net/> .

II. DMO(s) INFORMATION

If more than one DMO is involved in the project, please attach additional pages including this information

1. Indicate the name of the Destination Marketing Organization (DMO).
2. Indicate the mailing address of the DMO identified above.
3. Indicate the name and title of the individual who will serve as the DMO contact person for the grant. The contact person should be someone very familiar with the application who will receive all correspondence.
4. Indicate the phone number(s) of the contact person.
5. Indicate the email address of the contact person.
6. Indicate the fax number of the contact person.

III. PROJECT INFORMATION

1. Enter the title of the project.
2. Note whether the project involves start-up marketing activities or marketing of new heritage area products.
3. Briefly summarize your project in the space provided, clearly stating the goals of the project and how the goals will be attained. For example,

“The [name of heritage area] will conduct marketing activities aimed at introducing the heritage area to both in-state and out-of-state audiences by placing 5 print ads in Civil War History magazine, the Washington Post, the Baltimore Sun, Motor Coach Traveler magazine, and American Heritage magazine; developing a heritage area promotional traveling exhibit; utilizing a contractor to design, print and distribute 10,000 brochures; attending the American Bus Association and Eastern Sport, Travel & Outdoor trade shows; and hiring a consultant to complete a print ad evaluation survey to evaluate effectiveness.

PLEASE DO NOT ADD PAGES TO THE BRIEF SUMMARY. You will be able to provide a more detailed project description in the Marketing Project Narrative (Appendix II).

IV. PROJECT BUDGET

1. Provide the amount of grant funds requested from MHAA. Keep in mind that a maximum of \$50,000 is available per Certified Heritage Area for marketing activities.
2. Provide a breakdown of the amounts of required cash and in-kind contribution/match. MHAA grants require a minimum dollar-for-dollar match (i.e. the amount of required cash and in-kind contribution/match must equal the total amount of grant funds requested from MHAA). *NOTE: If additional cash or in-kind funding is being used to complete the project, that additional amount should be reported on Lines 3a and 3b below.
 - a. Provide the amount of required cash contribution/match the applicant will provide for the project. Remember that **cash match** must comprise **at least 75%** of the minimum required dollar-for-dollar match, although it may be any amount between 75% and 100% of the required match. For example, if \$50,000 of MHAA grant funds is requested, cash match must equal at least \$37,500, but can be up to \$50,000. (*NOTE: State funds may not be used as match, including funds annually granted to DMOs through MOTD's County Cooperative Grants Program. Generally no more than 35% of the minimum required cash match should consist of applicant staff salaries.)

- b. Provide the amount of in-kind contributions the applicant will provide. Remember that in kind contributions may comprise **no more than 25%** of the minimum required dollar-for-dollar match.
 - c. Provide the total amount of **all required** cash and in-kind contribution/match the applicant will provide (add Lines 2a and 2b). **This total amount must equal the amount being requested from MHAA on Line 1.**
3. If applicable, provide the amount of additional cash and in-kind funding that is being used to complete the project. This includes cash and in-kind contributions in excess of the amount being requested from MHAA (Line 1) and the total required cash and in-kind match (Line 2c).
- a. Provide the amount of additional cash funding being utilized to complete the project.
 - b. Provide the amount of additional in-kind contributions being utilized to complete the project.
 - c. Provide the total amount of **all additional** cash and in-kind funding being utilized to complete the project (add Lines 3a and 3b).
4. Provide the Total Project Cost (the sum of Lines 1+2c+3c).

V. PUBLIC INFORMATION DISCLOSURE

MHAA intends to make information available to the public regarding grant requests under the MHAA Grant Program. Information contained in this application may be confidential under Maryland's Access to Public Records Act. If you consider your information confidential and do not want it made available to the public, you must indicate so in writing and attach your objection to this application. By signing on the space indicated, you agree that not attaching an objection constitutes your consent to the information being made available to the public and a waiver of any rights you may have under the Act regarding this information.

APPENDIX II: SAMPLE MARKETING GRANT NARRATIVE

Please address all items listed in the following project narrative outline completely and concisely on 8 ½" x 11" bond paper. **TWO electronic/digital versions of the Project Narrative** must also be submitted on CD-R (Compact Disc-Recordable) disks; label the disk(s) with the heritage area name, project name, the names of all files, and the program used to create them. Use Microsoft Word or another program readable by Microsoft Word to produce the electronic version. Label the disk(s) with the heritage area name, project name, the names of all files, and the program used to create them.

PROJECT PLAN

I. Project Overview

Describe the project, providing background information on how the proposed marketing strategies were developed. What are the project's marketing objectives and how are they consistent with the goals and objectives of the heritage area? What previous research has been conducted to show that this approach is the most appropriate for achieving the heritage area's goals? How will these activities enhance the heritage area?

II. Project Methodology

Describe the methodology of the project, outlining each step you will use to achieve your marketing objectives. Be sure to describe your inquiry fulfillment process.

III. Project Timetable

List specific deadlines for each step in your project plan.

For example:

Issue RFP for design of print ads	By July 31, 2009
Complete photography for print ads	By August 31, 2009
Purchase print ad space for 5 adds (Civil War History magazine, the Washington Post, the Baltimore Sun, Motor Coach Traveler magazine, and American Heritage magazine	By September 30, 2009
Complete development of heritage area promotional traveling exhibit	By September 30, 2009
Complete brochure design	By November 15, 2009
Print 10,000 brochures	By December 31, 2009
Submit mid-project Progress Report to MHAA	By January 15, 2011
Mail brochures to Visitor Centers & DMOs	By February 15, 2011
Attend Motorcoach Assoc. trade show	March 23, 2011
Attend Eastern Sport, Travel & Outdoor trade show	By March 31, 2011
Complete print ad evaluation survey	By June 15, 2011
Submit Final Report and Disbursement Request to MHAA	By June 30, 2011

IV. Project Products

What tangible products will you generate? (e.g. 1 Promotional Traveling Exhibit, 50,000 Brochures, 2 Print Ads, etc.) Be specific, including the number of each product to be produced, if applicable.

V. Special Considerations

Describe what provision will be made for physical or programmatic access by disabled persons and what benefit the project will provide to underserved or minority individuals or groups.

PROJECT PERSONNEL

VI. Project Coordination

Who will direct the project and who will be responsible for the various components of the project? Describe the qualifications of the project staff and attach resumes of potential staff members.

VII. Grants Management

Describe your organization's administrative and financial experience and ability to manage a grant of this type. List the name, title, address, daytime phone number, email, and fax number of the individual(s) who would manage this grant.

PROJECT SUPPORT

VIII. Sources of Funds

- A. Identify and describe the source, type, and amount of funds your organization currently has in hand for this project. Documentation that these funds are in hand must be submitted as part of this application.
- B. Identify and describe the source, type, and amount of funds for which your organization has commitments for this project prior to the start of the project. Provide the names, addresses, and daytime phone numbers of these sources.
- C. Identify and describe the organization's efforts to fund this project from sources other than MHAA.
- D. Describe the State's past and present financial commitment to the project, if applicable.

SAMPLE

APPENDIX III: MARKETING GRANT BUDGET INSTRUCTIONS

Use the application budget sheet to prepare a budget. You may use the sample budget sheet as a template if you prefer to create your budget in a word processing, spreadsheet, or other computer program. **You must also submit two electronic/digital copies of your budget: please provide copies on CD-R disks with your application** (you may put your budget and project narrative on the same CD-R); please label the disks with the heritage area name, and the names of all files and the programs used to create them. **The budget MUST address project components mentioned in the Summary Scope of Work (Appendix I) and Project Timetable.** The budget should specify such expense categories as personnel, travel, equipment, supplies, rental costs, etc. The following sample budget for a marketing project is provided to illustrate both the process and format MHAA grant project budgets must follow.

1. Calculate the total cash needs of the project:

Project Manager-Heritage Area (\$20/hr x 125 hrs)	\$2,500
Project Monitor-DMO (\$25/hr x 20 hrs)	\$500
Print Ad Design (Consultant Services-flat fee)	\$2,000
Brochure Design Consultant Services-flat fee)	\$1,000
Brochure Printing (10,000 copies)	\$5,000
Print Ad Space Purchase (5 publications)	\$5,000
Design & Production of Promotional Traveling Exhibit	\$1,500
Trade Show Registration Fee (Eastern Sport, Travel & Outdoor Show; Motorcoach Assoc.)	\$400
Postage (Brochure Mailing)	<u>\$1,175</u>
TOTAL CASH NEEDS:	\$19,075

2. Calculate the available in-kind match:

Photographic Services (5 days @ \$400/day for on-site photo shoots; \$725 for editing & printing photo lab services)	\$2,725
"Destination Maryland" advertisement (*Ineligible State funds)	<u>\$3,000</u>
TOTAL IN-KIND CONTRIBUTION:	\$5,725

3. In this example, the total cost is \$24,800, but only \$21,800 is eligible for MHAA grant funding (*see NOTE below). The MHAA grant fund would provide up to \$10,900 in cash, and the applicant organization would provide \$8,175 in cash match, plus \$2,725 of in-kind contributions to meet MHAA's dollar-for-dollar and 75% cash match requirements. In addition, the applicant will also use \$3,000 of in-kind project funding above the required MHAA dollar-for-dollar match to carry out the project, and will **show this additional grantee-provided cash and/or in-kind funding in the appropriate "ADDITIONAL GRANTEE PROJECT FUNDING" column.** If no additional project funding above the required dollar-for-dollar match is being used to complete the project, leave these two columns blank.

***NOTE:** The Maryland Office of Tourism Development is providing a \$3,000 in-kind contribution for free ad placement in the State Visitors Guide "*Destination Maryland*." However, because these are State funds, the \$3,000 is not eligible as required match (State funds cannot be used as required match). This in-kind contribution should therefore be listed in the Project Budget column for "Additional Grantee Project Funding (In-Kind)".

4. Once a workable budget structure has been prepared, enter the line items on the budget page provided in the application file. Items should be organized by cost category so that similar costs are grouped together, regardless of whether they are cash or in-kind contributions. Rates of pay or similar cost breakdowns should be included in each line item. Attach any estimates you have obtained to support your budget.

(See following page for Sample Marketing Budget).

SAMPLE MARKETING BUDGET

LINE ITEMS	MHAA GRANT FUND	REQUIRED GRANTEE CASH MATCH	REQUIRED GRANTEE IN-KIND MATCH	ADDITIONAL GRANTEE PROJECT FUNDING (CASH)	ADDITIONAL GRANTEE PROJECT FUNDING (IN-KIND)	TOTAL PROJECT COST
Project Manager – Heritage Area (\$20/hr x 125 hrs)		\$2,500				\$2,500
Project Monitor – DMO (\$25/hr x 20 hrs)		\$500				\$500
Design of print ads (Consultant Services-flat fee)		\$2,000				\$2,000
Brochure design (Consultant Services-flat fee)		\$1,000				\$1,000
Photography (5 days @ \$400/day for on-site photo shoots; \$725 for editing & printing photo lab services)			\$2,725			\$2,725
Photographer donated time (72 hrs. x \$35/hr) and travel (\$480)					\$3,000	\$3,000
Brochure Printing (10,000 copies)	\$4,000	\$1,000				\$5,000
Purchase of print ad space (Civil War History magazine @ \$2,000, the Washington Post @ \$500, the Baltimore Sun @ \$500, Motor Coach Traveler magazine @ \$750, and American Heritage magazine @ \$1,250)	\$5,000					\$5,000
Design & production of heritage area promotional traveling exhibit	\$1,500					
Trade Show Registration Fee (Eastern Sport, Travel & Outdoor Show @ \$150; Motorcoach Assoc. @ \$250)	\$400					\$400
Postage for Brochure Mailing		\$1,175				\$1,175
TOTALS:	\$10,900	\$8,175	\$2,725		\$3,000	\$24,800

5. Identify source(s) of matching funds and in-kind contributions. If more than one organization is providing support, identify each organization and the kind and amount of support.

Donor: Heritage Area Management Entity
Source: Operating Funds
Kind: Cash
Amount: \$2,500
Date Available: Immediately

Donor: County DMO #1
Source: Appropriated Funds
Kind: Cash
Amount: \$5,225
Date Available: Start of fiscal year

Donor: Institute of Art
Source: Photo Services
Kind: In Kind
Amount: \$2,875
Date Available: July 1, 2010

Donor: County DMO #2
Source: Operating Funds
Kind: Cash
Amount: \$500
Date Available: Start of fiscal year

Donor: McLean Photographic Services
Source: Donated photo services
Kind: In Kind
Amount: \$3,000
Date Available: July 1, 2010

APPENDIX IV – HERITAGE AREA MARKETING PLAN OUTLINE

Heritage area marketing activities may be funded by MHAA provided that the heritage area management entity has completed a marketing plan in coordination with its affiliated Destination Marketing Organizations (DMO). Please submit a copy of the approved Heritage Area Marketing Plan. The Heritage Area Marketing Plan should reflect goals and objectives of the Heritage Area Management Plan and must:

- include a mission statement,
- outline a marketing positioning summary outlining strengths, weaknesses, and market segmentation,
- identify marketing programs with associated objectives and performance measurements; and,
- list strategies for obtaining the plan's objectives associated with the marketing activities that are eligible for funding, which include advertising placement, consumer/travel trade shows, printed material/collateral and website development.
- include a media plan/schedule for all ads paid for wholly or in part with grant funds.

Ideally, the heritage area marketing plan should include information about the following types of activities:

- I. Administrative activities
 - A. Budget and Clerical
 - B. Office Management
- II. Sales and Marketing activities
 - A. Advertising
 1. Audience segmentation by demographics, geography, types of travelers (consumer, trade, special interest or niche)
 2. Media outlet selection
 3. Integration of communications tools such as direct mail, cooperative promotions, or advertorials.
 - B. Public Relations
 - C. Specialized Group Markets
 - D. Packaged Travel Market
 - E. Consumer and Travel Agents
 - F. International
- III. Development activities
 - A. Research
 - B. Destination Resource Management
 1. Product Development
 2. Grants and other alternative funding sources
 - C. Special Events/Promotion
 - D. Publications
 - E. Welcome Centers
 - F. Workforce Education and Training Program
 - G. Information Technology
 1. Database Management
 2. Telemarketing and Direct Response
 3. Website Development and Maintenance
 - H. Professional Staff Development